



# TRAVEL DISTRIBUTION AND RETAILING UPDATES



WEEKS 51 & 52, 2025; 1 & 2, 2026

**THIS EDITION CONTAINS NEWS ON:**

Air Cairo | Air France-KLM | All Nippon Airways | American Airlines |  
Drukair – Royal Bhutan Airlines | Ethiopian Airlines | Lufthansa |  
Riyadh Air | TUI Airline Group | Wizz Air | Amadeus | CWT

# LUFTHANSA GROUP PARTNERS WITH AMADEUS NEVIO

Nine Lufthansa Group (LHG) airlines, including Austrian Airlines, Brussels Airlines, Lufthansa, and SWISS, are set to utilise Amadeus Nevio's capabilities. The partnership focuses on enabling personalised retailing, transitioning to a single Order system, and eventually implementing Delivery Management. LHG may become the first airline group to integrate Amadeus Delivery Management.

LHG's addition marks the fifth airline customer announced for Amadeus' Nevio product suite.

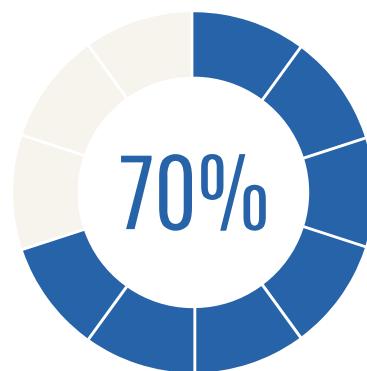
## **Nevio's current roster (and announcement date)**

Lufthansa Group	January 2026
Air France- KLM	February 2025
British Airways	April 2024
Saudia	October 2023
Finnair	December 2022

## AF-KL TACKLES L2B SURGE USING AMADEUS TECH

Air France-KLM (AF-KL) has reported positive results in reducing unproductive traffic on its systems by using Amadeus' 'Advanced Airline Profile'. The solution uses machine learning algorithms to filter out low-probability requests from agencies. Following initial deployment with a limited number of airlines, the solution is now being rolled out automatically to all Amadeus NDC airlines, with the integration expected to be completed in Q1 2026.

Hybrid NDC/EDIFACT infrastructures and the advent of agentic AI have caused look-to-book (L2B measures the average number of price/shopping requests per booked segment) ratio growth to accelerate.



of 'unproductive' traffic has been cut out, early reports from AF-KL indicate

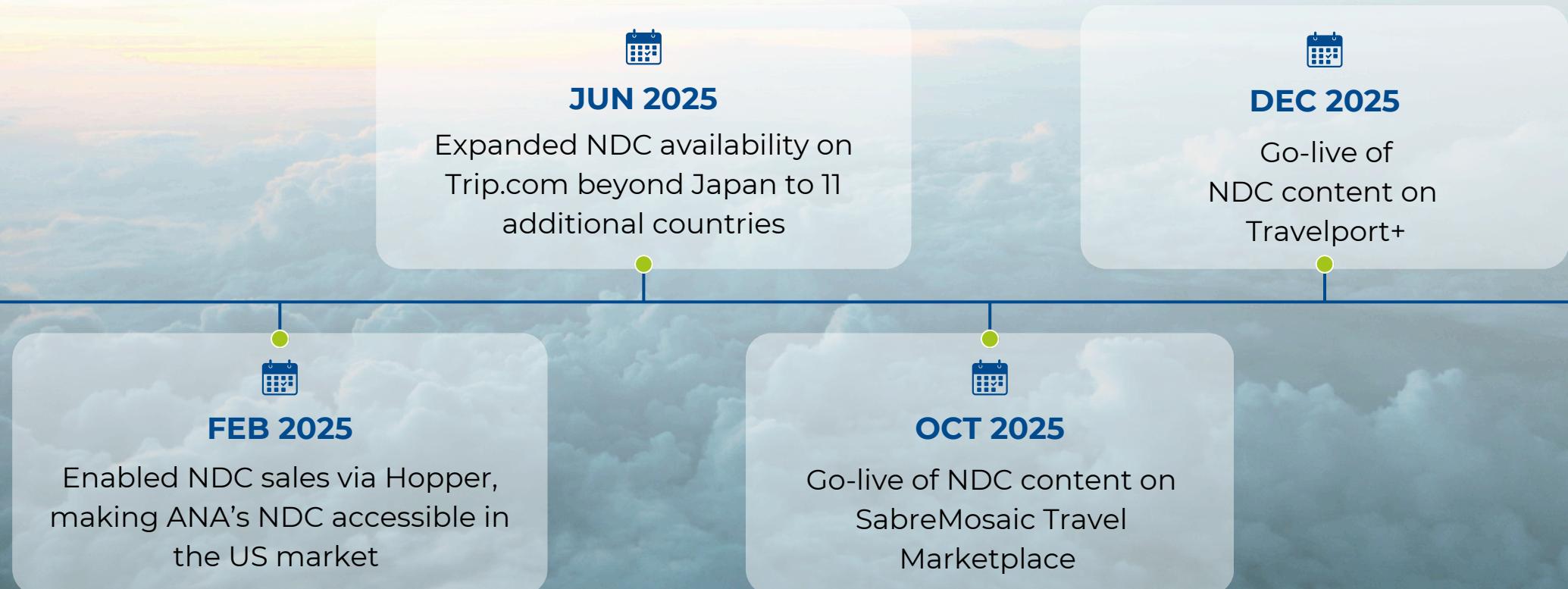
You can read Oystin's take on the factors causing an increase in the L2B ratio and potential vulnerabilities for distribution and IT contracts in our Distribution Insights 2025:

<https://share.hsforms.com/11e01OnS6TAe5OpYLI613lwzaam>

# ALL NIPPON AIRWAYS NDC GOES LIVE ON TRAVELPORT

All Nippon Airways (ANA) has integrated its NDC content into Travelport+, giving all connected travel sellers access to 'its full range of products and ancillaries through NDC'. The integration is live in 40 countries. The GDS and carrier signed a distribution agreement including NDC in November 2024, making the implementation period approximately 12 months.

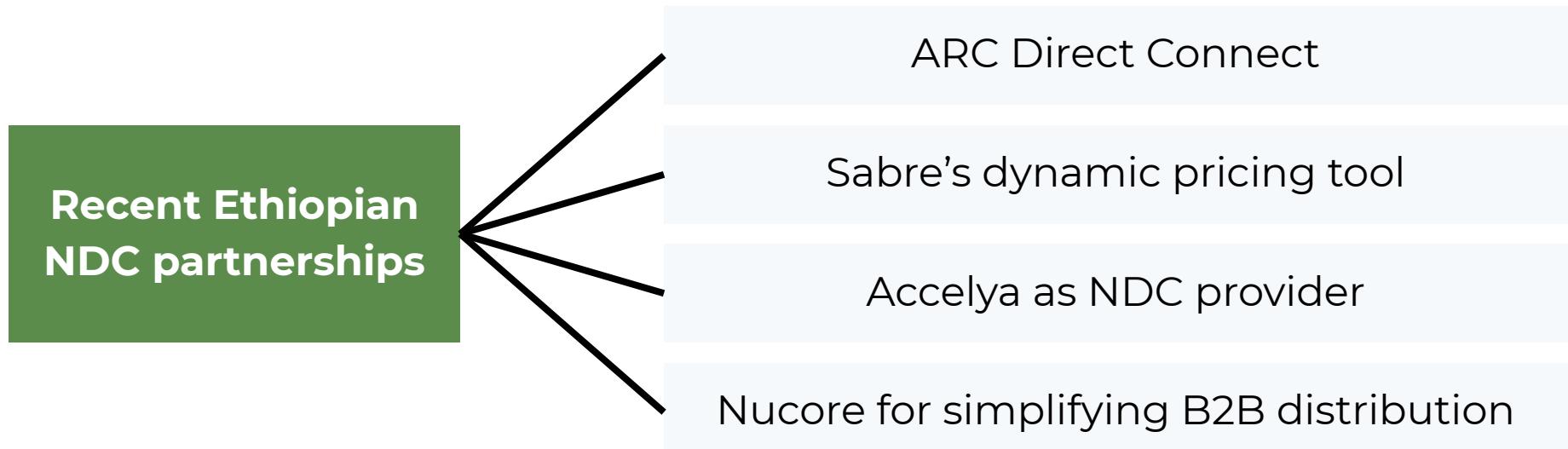
## ANA's 2025 NDC and retailing efforts



# ETHIOPIAN SIGNS NDC DEAL WITH NUCORE TECHNOLOGIES

Ethiopian Airlines (ET) has entered a strategic partnership with Nucore Technologies aimed at streamlining B2B distribution. The partnership connects Ethiopian's NDC and agency platforms with Nucore's TRAACS back-office systems, helping automate billing, payments, and reconciliation for travel agencies, OTAs, aggregators, and corporate customers.

Since November 2025, ET has been steadily expanding its NDC efforts. The carrier will provide an NDC API using Accelya's FLX Select product and has joined ARC Direct Connect, enabling distribution of NDC content in the US. ET has also integrated Sabre's AI-based dynamic pricing tool, SabreMosaic Airline Retailing, to 'manage the entire offer-to-order lifecycle in real time'.

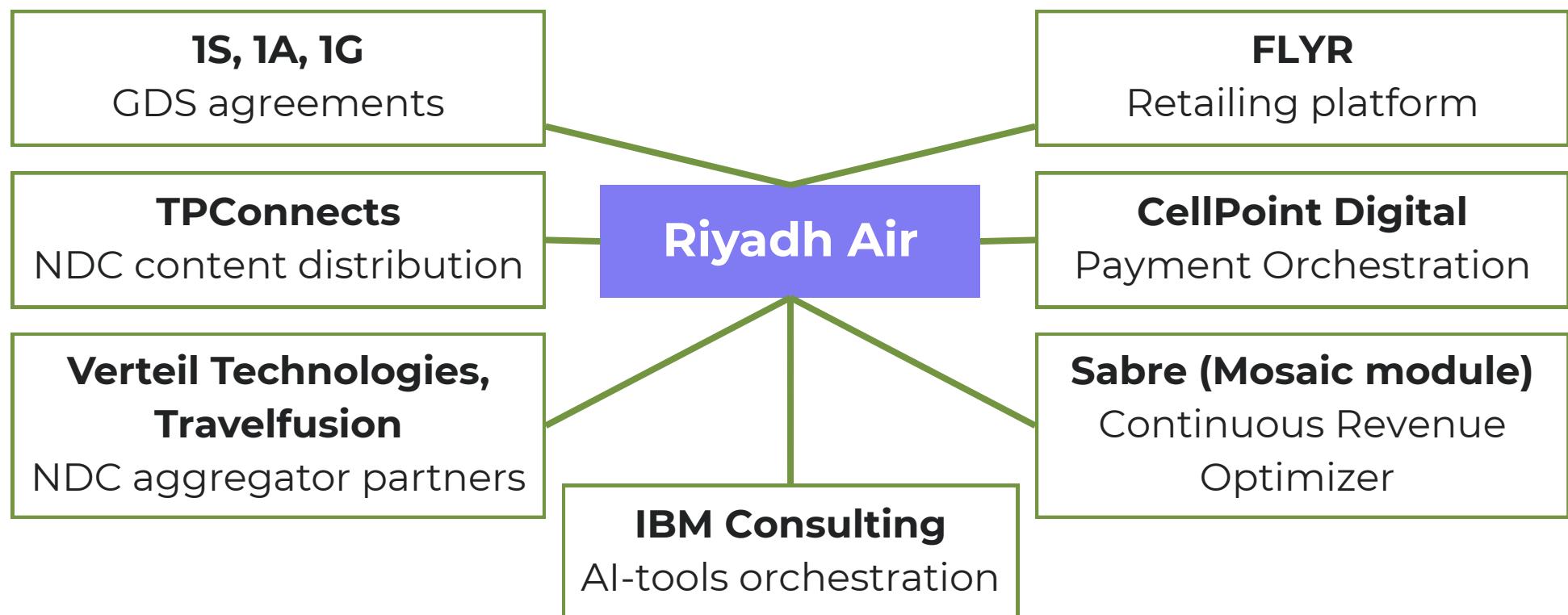


# RIYADH AIR ANNOUNCES PARTNERSHIP WITH TRAVELFUSION

Riyadh Air has entered a strategic partnership with NDC aggregator Travelfusion. Travel sellers connected via Travelfusion will have access to Riyadh Air's NDC content, including dynamic fares, ancillaries, and branded products.

Ahead of launching commercial flight operations, Riyadh Air has been entering into multiple technology and commercial agreements.

## Selection of Riyadh Air's technology and commercial partnerships





## **WIZZ AIR CONTENT AVAILABLE ON AIRGATEWAY**

Low-cost carrier Wizz Air's content is now offered on AirGateway via the aggregators' integration with Kyte. Late last year, the carrier entered into a partnership with Kyte, enabling Kyte-connected corporate travel sellers (TMCs and corporate booking tools) access to the carrier's content. The integration includes fares, ancillaries, and bundles.

AirGateway now has direct NDC connections with 35+ airlines.

## **AIR CAIRO RENEWS AGREEMENT WITH TPCONNECTS**

Air Cairo has renewed and expanded its strategic collaboration with TPConnects. The partnership ensures continued use and further leverage of the Astra B2B Agency Platform and NDC API Gateway.

Last year, TPConnects went live with EGYPTAIR's NDC content on its agency platform. EGYPTAIR's NDC platform and API are also powered by the TPConnects Astra NDC API Gateway solution.

# EU PARLIAMENTARIANS URGE MOVE AWAY FROM CWT POST AMEX DEAL

The effects Amex-CWT merger can now be felt in the European Parliament. A group of 64 members of the European Parliament (MEPs) have urged the president of their body to move away from CWT, the Parliament's current travel management company to a European TMC, amid concerns about potential interference or surveillance by the United States and after reports of CWT late last year canceling trips of a United Nations Special Rapporteur to comply with US sanctions.

Amex GBT announced its 540M USD (reduced from 570M USD initially) acquisition of CWT 18 months ago. It faced major delays due to regulatory challenges, first by the UK CMA, then a trial on a US DOJ lawsuit. In July, the DOJ voluntarily dropped the case, and the deal was closed in September. It is expected to generate around 155M USD in annual run-rate synergies within the next three years.

## MORE AIRLINE UPDATES

**TUI Airline Group** has become the first airline partner for **Navitaire Stratos**, transitioning from its previous New Skies platform. In November 2024, Amadeus announced a new version of the Navitaire platform, Stratos. The platform is designed for LCCs and Hybrid carriers to enter the modern retailing world. This includes supporting the NDC standards, Offer/Order concepts, and Dynamic Offers.

**American Airlines** is no longer awarding AAdvantage miles or status credit on Basic Economy tickets since December 17, 2025. This change aligns more closely with Delta's approach to Basic Economy, while differing from United, which continues to award limited loyalty credit on these fares.

**Drukair – Royal Bhutan Airlines**, the flag carrier of the Kingdom of Bhutan, has signed a deal with **Worldpay** for a payment gateway. Late last year, the airline also signed its first distribution agreement with **Amadeus**, marking its entry into the GDS ecosystem.



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- Structured, flexible and customizable, modular approach to distribution strategy solutioning
- Audits that offer airlines solutions to specific problems in GDS and NDC distribution
- Offer-Order transformation approach

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